

## The Network Competition: 1978

**ABC-TV's grip slips a bit; network maintains leadership in prime in 211 markets but by diminished margin; it's still struggling in nightly news and Monday-Friday daytime**

ABC-TV affiliates still tend to dominate their markets in prime time but are fighting an uphill battle in daytime and network news time. Moreover, their grasp in prime time seems a little less firm than a year ago, and CBS-TV and NBC-TV affiliates maintain control of markets in the two other key dayparts.

That's the bottom line of BROADCASTING, second annual report on the three-network competition, market by market, as based on homes-reached standings in February-March, after new season schedules and midyear changes have had a chance—more or less—to shake down.

This year's findings and conclusions, like last year's inaugural study (BROADCASTING, May 9, 1977), are based on compilations by ABC-TV researchers from Arbitron Television's February-March sweep measurements of all 211-208 a year ago—Arbitron areas of dominance influence (ADI's).

These show that, including first-place ties, in prime time ABC affiliates were on top in 104 markets, CBS-TV affiliates were first in 67 and NBC-TV affiliates were ahead in 46.

In daytime, on the same basis, CBS affiliates came out on top in 101 markets, NBC affiliates in 67 and ABC affiliates in 50.

In network news periods, again counting ties, CBS affiliates were ahead in 107 markets, NBC affiliates in 75, ABC affiliates in 30.

The market-by-market figures for these three day parts are shown in the accompanying tables. On a strict numerical count these indicate that ABC affiliates are ahead in fewer markets than they were a year ago, when there were three fewer ADI's.

Thus in prime time, ABC affiliates have dropped from first place (including ties) in 113 markets in February-March 1977 to 104 in this year's sweep. In network news time their leadership last slipped from 31 markets to 30, and in daytime from 53 markets to 50 markets.

CBS affiliates meanwhile have gone in leadership from 57 markets to 67 markets in prime time, from 106 to 107 in news time and are holding even at 101 first-place market positions in daytime, while NBC affiliates have moved in number one positions from 43 markets to 46 markets in prime time, have slipped from 79 to 75 in network news time and advanced from 63 to 67 in daytime.

In markets that count most to advertisers, however, ABC affiliates remain strong: In February-March 1978, they were tops in prime-time in 14 of the top 15 markets, just as they were a year ago.

In daytime, ABC affiliates led in 10 of the top 15 while CBS

affiliates were ahead in four and an NBC affiliate in one. In network news, CBS affiliates led in nine of the top 15, NBC affiliates in five, ABC in one.

In the 116 markets in which all three networks have primary affiliates, according to ABC researchers, ABC stations reached 15,747,000 homes per average half hour in prime time, a 38.2% share of the three-network audience but down from 16,318,000 homes a year earlier (when only 133 markets had affiliates of all three networks). CBS affiliates reached 13,437,000, a 32.6% share and up from 12,611,000 a year ago. NBC stations reached 12,067,000 for a 29.1% share and a rise from 11,383,000 the year before.

In the same three-network markets in daytime, ABC and NBC stations increased their home delivery in February-March this year—ABC to 5,318,000 homes for a 32.7% share, NBC to 5,126,000 for a 31.6% share. CBS affiliates still reached more than either of the others in daytime 5,797,000 or 35.7% but nevertheless declined from the 1977 February-March figure of 5,826,000.

In the same 136 markets in network news time all three networks showed gains in households—CBS to 11,267,000 homes, or 38.7%; NBC to 10,218,000 or 35.1% and ABC to 7,624,000 or 26.2%.

In two dayparts not covered in the tables, NBC led in early morning with an increase to 4,007,000 homes, or 49%, while ABC climbed to 2,803,000 or 34.2% and CBS slipped to 1,379,000 or 16.8%; and in late night NBC led with an increase to 5,407,000 or 48.9%, ABC remained in second on an increase to 3,144,000 or 28.5%, and CBS increased but nevertheless stayed in third place with 2,496,000 or 22.6%.

The tables, based on information compiled by ABC researchers from Arbitron February-March sweep data, show how primary affiliates of the three major networks stacked up in homes delivered in three major day parts—prime time, network news and Monday-Friday daytime. The numbers in the "H" (households) column represent thousands of homes delivered per average half hour (add 000). The percentages (%) represent change from the February-March 1977 sweep. News time represents the network evening news programs. Daytime is 12-4:30 p.m. Prime time is 7:30-11 p.m. NYT Monday-Saturday and 7-11 p.m. Sunday with all local programming excluded. Bold-face figures indicate the top network in each market; IFR: Insufficient data for reporting; NC: Not carried or delayed; blank space: no affiliate in market; dash (—): household figure unchanged from 1977.

MARKET	PRIME TIME						EVENING NEWS						DAYTIME					
	ABC		CBS		NBC		ABC		CBS		NBC		ABC		CBS		NBC	
	H	%	H	%	H	%	H	%	H	%	H	%	H	%	H	%	H	%
1. New York	<b>1582</b>	+3	1197	+17	1053	+9	536	+9	<b>702</b>	+14	539	-15	<b>804</b>	+21	396	+5	575	+26
2. Los Angeles	<b>827</b>	-10	505	-1	589	-4	313	+7	194	-15	<b>377</b>	-1	<b>287</b>	+17	110	-41	236	-2
3. Chicago	<b>705</b>	-1	494	+10	446	+9	255	+2	<b>335</b>	+38	224	-4	<b>285</b>	+11	165	-5	124	NC
4. Philadelphia	<b>636</b>	-3	427	+5	396	+22	<b>394</b>	+13	266	-1	302	+2	<b>258</b>	+7	167	-13	138	+20
5. Boston	<b>388</b>	-7	289	-4	272	+5	152	-7	183	-16	<b>300</b>	+5	107	-13	112	+12	<b>121</b>	+16
6. San Francisco	<b>337</b>	-4	267	+5	247	+1	170	-18	<b>227</b>	-5	124	-1	<b>79</b>	-22	75	-20	71	+9
7. Detroit	<b>429</b>	-2	318	+4	309	+9	175	+6	192	-16	<b>231</b>	-5	<b>160</b>	+16	116	-7	96	-16
8. Washington	<b>258</b>	-9	243	+6	215	+4	99	-13	<b>201</b>	+3	177	+20	<b>94</b>	+3	92	-12	69	-5
9. Cleveland	<b>357</b>	-1	246	-1	230	+2	198	+2	<b>219</b>	+10	135	-17	<b>120</b>	-7	62	-22	80	-15
10. Pittsburgh	<b>332</b>	-3	270	+4	159	-2	186	-1	<b>247</b>	+8	70	+1	57	-34	<b>153</b>	+20	85	+12